Fundraising Bootcamp

for EDs of small nonprofits

Lelia MacDonald
www.masadvise.org
info@masadvise.org
416-963-5792
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Pro Bono Consulting for Non-Profits

Preface

Do you think your biggest challenge is getting more donations? Do you focus on the money?

Change your focus.
- **Time.** If you use your time wisely, the money will follow.
- **Relationships.** If you build relationships, the money will follow.

Look at the sources of all of your revenue. Some sources are going to be a more efficient.

Foundations (family, corporate)	efficient	*18%
Corporations	efficient	7%
Major donors	efficient	14%
Regular donors (email, direct mail, contests, social media, ads) - Acquiring new donors - Renewing existing donors	 expensive efficient	 19% 5%
Events	average - expensive	19%
Government grants	efficient	9%
Operating revenue	na	na

* % of total donations, "Major Gift Fundraising: Unlocking the Potential for your nonprofit" Sargent, Plymouth University.

Why MAS made this booklet

This booklet is the minimum you need to get started.
Fundraising is a big area. Many books have been written. EDs of small nonprofits need to focus on the key donor segments that will generate the most cost effective revenue.
Pick one activity and do it well.

Which donors should you target?

Where do you start?

1. Start research

Find Grant Connect. Offered by Imagine Canada at a low price, this database lists Canadian foundations, US foundations in Canada, 200 corporate foundations. Before you buy, view it for free at Toronto libraries.

Search the database to find 10-15 foundations who

- are interested in your type of work, or your audience
- have sufficient giving potential
- give to similar organizations
- fund what you need (operating, capital, project)
- give in your area

2. Establish contact

- determine if your Board or staff have contacts
- call Program officer (unless it specifically says not to)
- try to establish a relationship with program officer (invite to an event, offer a tour of facility, add to your mailing list)

3. Write proposal What's in a good proposal?

- summary of project. Identify a specific program (it's harder to get funding for operations)
- specific objectives
- specific request
- your achievements and metrics (to prove that you can do what you promise)
- human interest stories
- statistics on the need and how you are addressing it
- partners, other donors (to validate that others believe in you)
- evaluation plan (how you will measure your performance)
- timing and budget

Tips:

- tailor each proposal to the interest of each foundation
- be clear and concise. If it's an online application, copy and paste from your website to ensure consistency.
- present your strengths, not your needs
- make your case, from the donor's point of view

4. Create a filing system to **track all contacts** (See appendix)

Which donors should you target?

Foundations are charities that pool donations, from one or many donors and then disburse at least 3.5% per year to other nonprofits, within selected causes. Foundations can be

- public (eg Toronto Foundation)
- private (eg Rogers foundation)
- corporate (eg RBC Foundation)
- charitable (eg Royal Canadian Legion)

How will your proposal be evaluated?

- importance of and need for program
- whether the program fits their guidelines
- soundness of the plan
- feasibility
- capability of your nonprofit (foundations will almost never support a nonprofit in the red)
- duplication with other programs
- whether they have given to you before (and your performance)
- cost efficiency

If your proposal is successful:

1. thank you telephone call and thank you handwritten note
2. insure you meet all their reporting requirements
3. nurture the relationship

If your proposal is not successful:

1. telephone to find out specifically why not
2. ask if there are changes you can make to try again
3. nurture the relationship

Remember

Many foundations will consider applications every year or 2 years, so don't forget the importance of building and sustaining strong relationships.

Some foundations will request anonymity and require minimal face time throughout the year.

Some reasons why it can be hard to renew foundations are:

- donations may be tied by personal loyalty to the fundraiser
- some foundations never intend their donations to be long term (ie they wish to encourage financial independence)
- foundations can change their focus

Which donors should you target?

Philanthropic budget
Smaller corporations may have a budget based on employee wishes:
- match employee personal donations
- allow employees time off to volunteer
- give an in-kind donation of goods that the corporation produces.

One way to get more of these donations is by asking your current donors to approach their employer on your behalf.
Larger corporations may also have a budget based on their Corporate Social Responsibility strategies. Find out whether your cause fits within a company's policies by researching their website.

Sponsorship budget
This budget is based on the needs of the corporate brand.
Some corporations want to tie their brand to a good cause. You can offer visibility to a corporate brand (posters at your event, their logo on your trucks). There is a risk to you, if the corporate reputation fades or if it upsets your other donors.

Build an inventory of sponsorship ideas

Price individually to allow each corporation to select (ie not gold/silver/bronze). Price relative to for-profit advertising costs.
- logo placement
- marketing material at charity events
- link to their website (which increases their ranking in search engines)
- invitation to speak at volunteer recognition event
- LunchNLearn for their employees
- article in our newsletter (circulation #)
- article/photos for their newsletters
- naming rights
- permission to use our logo
- post on their Facebook page
- VIP seats
- sector exclusivity
- video thanking them (which they can embed on their website)
- acknowledgement in our presentations
- opportunity for staff to volunteer
- explain our cause to their employees

How to approach a corporation

1. Find leads by brainstorming with Board. Search sponsors of similar charities. Search competitors of existing sponsors. Research more than double the number of corporations you need.
2. Get a meeting/telephone call. Ask their marketing needs? Who is their target audience? What other charities do they sponsor? What do they like to see in a sponsorship package?
3. Customize a package that addresses:

- what is in it for the corporation? (eg the target audience that will attend your event)
- any concerns they might have in associating with your nonprofit. (eg if they are placing their logo on your delivery trucks, explain that your trucks are clean with minimal exhaust.)
- how you will measure success
- specific timing and request ($ or in-kind or both)

5. Follow up. Give The Ask. Connect on LinkedIn.
6. If successful, develop a plan for contact and at what frequency.
7. At term-end, prove that your sponsor got what they wanted (photos, statistics). Show how their sponsorship allowed you to raise more money from other donors. Ask for renewal.

Major Donors

Which donors should you target?

What you need to get started

Major donors are regular donors who give more than average.

- recruit, train and manage volunteer canvassers (ideally who have already donated to you to add credibility)
- research prospects (expect 5 prospects for every one “yes”).
- each prospect needs a customized plan (level of gift, reason for giving, who will do the ask)
- prepare good presentation material
- create a recognition program for donors
- create a stewardship program to follow up with donors
- make a good database to track every interaction

Traps to avoid

- Avoid temptation of time-consuming ways to communicate (annual reports are expensive and have limited distribution, newsletters eat staff time).

- keep your donor database updated. It is your “institutional memory” in case of employee turnover. With an average portfolio size of 100-150 donors per full-time fundraiser, it is hard to remember personal details. The rule of thumb is that each fundraiser should raise 5x their salary. Consider creating a separate database for prospective donors as a Google spreadsheet that volunteers can access.

- be prepared. Prepare back-up kits for car and home. Include paper copy of PowerPoint, USB, brochures, blank paper and pens, paper copy of each page of website, etc.

- expect rejection. Ask donors why? Is it the organization? The project? The amount? The timing?

How to find leads

1. Calculate your threshold (eg $200+). Identify existing donors over your threshold. Treat them specially. Segment them eg ask older, long term donors to name you in their will.
2. Identify existing donors who give just under your threshold. Contact them.
3. Convert in-kind donors
4. Convert volunteers
5. Approach local service clubs and groups and offer to make a presentation about your cause
6. Workplace LunchNLearns about your cause
7. Ask your Board of Directors to introduce ED to their family, friends, colleagues and business contacts.
8. Ask your Board of Directors to name you in their own wills.

The Fundraising Process

Fundraisers manage donors through phases: identify, qualify, solicit and steward. The larger the donation, the more attention the donor gets.

1. **find leads** (see previous page)

2. **research prospect** (Google name, address, social media, employer)

3. find the right **relationship builder** amongst staff/volunteers to accompany you.

4. **send invitation** (set up a discovery meeting or invite to an event, not ask for $)

5. follow up to **set meeting** (if decline, add to tracking sheet)

6. **meeting #1 -** discover their giving needs. Ask open-ended questions:
- Do you have any personal experience with our cause?
- Do you have any suggestions on new ways we can address our cause?
- Why is donating important to you?
- What do other charities do that you enjoy?
- Does any one else in your family help you make donation decisions? If yes, may I contact them?
- Where are we in your giving priorities? What would it take for us to be your top priority?

7. **meeting #2** - the Ask. Based on their responses above, tailor a proposal to fit.
- Relationship builder (person who knows the donor best) – introductions.
- Staff - reason for visit. Summarize the benefits to the donor, the non-profit and to the community.
- Volunteer - why I'm involved. Emotion is ok. Make your story personal. Share the dream. Explain why your nonprofit is the best way to address the cause.
- Volunteer - the Ask. Be specific. "Ms. Jones, we would like you to consider making a commitment of $5,000 each year for the next five years to help us make this program happen".
- Be silent. Resist the urge to make nervous chatter.
- Relationship builder - closing and follow up

8. **follow up**. If decline, add to tracking sheet. If accept, sign a gift agreement for multi-year commitments.

9. **regular contact** Ask their choice of frequency and content, The number of contacts can vary based on the $amount. Smaller donors may want only 1 contact over a 1 year cycle. Major donors may require 3 contacts/year over a 3 year cycle.

10. **renewal** (return to Step #5)

Regular Donors

Which donors should you target?

Unlike traditional fundraising which focuses on one-to-one relationships, managing regular donors is more like traditional marketing – focusing on one-to-many communication.

There are numerous ways to communicate and each has advantages and disadvantages.

Email (E-newsletters)
- inexpensive and flexible. Staff time commitment.
- rule of thumb: $40 raised or 29 actions per 1000 emails

Events
- very easy to not make money (upfront investment, divert staff time away from other duties)
- good way to "friend raise" – to build mailing lists, need a thorough follow-up plan to solicit afterwards
- allow volunteers to run events (to reduce costs)
- do one event and build awareness over years (avoid multiple events each year)
- events run by third-parties are very cost efficient

Social media
- needs to be part of a larger social media strategy - fundraising requests should be <10% of all messages.
- need an integrated, multichannel approach, need understanding of best practices, need fundraising database (eg Raiser's Edge, Salesforce)
- reaches younger donors, convenient for donors
- rule of thumb: 285 Facebook, 112 Twitter followers per 1000 email database

Direct mail
- add to your own list or exchange with similar nonprofits. Your nonprofit must have an explicit policy and have already obtained donor consent.
- need good database to track donations, sent receipts, thank you notes
- good way to test different messages and packages
- contracting out is not allowed by agencies in Canadian Christian Charities

Recruit fundraising skills

Each donor type requires staff and volunteers with specific skills. What skills does the Chair of the Fundraising Committee need? Ironically, not fundraising because she may not personally fundraise. Instead, the Chair must know how to lead and coach a team.

		Fundraising skills needed
Admin skills	Foundations	Computer (research databases, submit applications) Writing (concise, clear messages) Organized to keep track of deadlines
For-profit sales skills	Corporations	People skills (listening, building relationships) Organized to juggle a portfolio of donors Creativity to align needs of nonprofit with corporation Ability to justify finances of nonprofit
	Major donors	People skills (listening, building relationships) Organized to juggle a portfolio of donors Creativity to align needs of nonprofit with donor Resilience to overcome many donor declines
For-profit marketing skills	Regular Donors	Clear thinking to produce clear writing Creativity to produce fresh content Fresh eyes to see you as outsiders see you

Do you have the time and support?

Do you have sufficient staff?
For a small nonprofit to get started, it usually occupies one full time position (spread amongst several staff).

Do you have sufficient volunteers?
Remember that managing the volunteers will eat time that staff would devote to their own fundraising projects.

Do you have Board support?

- introduce staff to the directors' own networks
- open doors outside their networks
- partner with staff on a solicitation visit to a general audience, a cultivation visit to a prospective donor, a stewardship visit to an existing major donor
- telephone calls to thank donors
- bring friends to events, host events
- personally donate

How to present to the Board?

Evaluate the efficiency of each revenue stream.

The last column is the most important; it focuses agreement on how you should spend your fundraising time and money. In this example, the nonprofit should focus on foundations and major donors, while reducing time spent on regular donors and events.

Revenue Efficiency Report – every year-end (for nonprofits that are volunteer-run)				
Source	Revenue	Volunteer hours	Revenue /hour	Target Next year
Foundations	$50,000	100	$500/hr	↑
Corporations	$25,000	100	$250/hr	=
Major Donors	$10,000	0	excellent	↑
Regular Donors - Facebook - Twitter - enewsletter	$10,000	 20 20 50	$100/hr	↓
Events	$40,000	100	$200/hr	↓
Government Grants	$50,000	10	$5000/hr	↑
Operating revenue	$50,000	100	$500/hr	=
Total	$235,000	500	$470/hr	=

Tips for creating your own report:

How do I estimate the time staff spend on each donor type?

Initially, an estimate from a supervisor is fine. You don't need time charts.

How accurate do I have to be?

Unlike audited financial statements that require complete accuracy, these reports are for management purposes. You don't need a new accounting system. Stop when you feel that you have enough information to make a decision and that further analysis will not change that decision.

What do I do if the data is not clean?

If the data contradicts common sense, use common sense.

What if there is a difference between CRA data and our audited statements?

Sometimes it is hard to make business decisions based on CRA data (for charities with fluctuating donations). Instead, use data from your audited statements.

Pick one activity and do it well

Learn from others. Here are examples of what some small nonprofits have done.

1. choose the most cost efficient donors
2. figure out what is the best activity to attract those donors
3. make the tools to fit the activity
4. start with a small test group
5. track results and learn

Examples of what other nonprofits have done			
Cause of each nonprofit	Donor types selected as the most cost efficient	Fundraising activity that is the most cost effective	Marketing tools needed
family counselling	major donors	parlour meetings	presentation
	foundations	write applications	website
addiction	major donors	LunchNLearns	presentation
women's health clinic	women recipients	postal code mail drop	leaflet
	corporations	solicitation by ED	ask letter
international aid	volunteers	church group meetings	presentation
seniors' advocacy (no CRA)	major donors, to ask for bequests	in home meetings	brochure
travelling museum (no CRA)	schools, to increase bookings	mail to schools	brochure
	corporations, to sponsor new exhibit	mail to head office	ask letter

How to manage a Fundraising Committee

Orient:
- Assign responsibilities
- Practise elevator speeches
- Explain marketing tools

Monthly meetings:
- Follow agenda: collate stats, ensure prospecting database is current.
- Share ideas – document to build institutional memory
- Celebrate successes. Inspire enthusiasm.

XYZ charity
Fundraising Plan 201x

Fundraising Committee:	
Pearl	Foundations - acquisition
John	Corporate - retention
Jake	Major donor - acquisition
Jim	Major donor - retention
Jane	Post event follow-up
Other contributors:	
Harry, Treasurer	Handwritten thank you notes
Bob	Telephone all volunteers to role play their elevator speeches
Bill	Accompany ED on donor visit
Jill	Set up 5 presentations for ED about cause

Identifying names and roles is a great way to make sure volunteers do what they promised to do!

Goals

1. Increase revenue from
   - foundations from $xx to $xx
   - Major donors from $xx to $xx
   - Government grants from $xx to $xx

2. Decrease time spent on regular donors and events

3. Spread workload (to avoid burnout and to offer activities for volunteers with different skill sets)

Revenue Efficiency Report – every year-end (for nonprofits with some costs and staff time)					
Source	Revenue	Fundraising + Marketing costs	Fundraising + Marketing Time	Costs+time /revenue	Target Next year
Foundations	$50,000	$0	15%	great	↑
Corporations	$25,000	$0	20%	ok	=
Major Donors	$10,000	$0	0%	great	↑
Regular Donors	$10,000	$1,000 Xmas mailing	20% Social media	poor	↓
Events	$40,000	$20,000	20%	poor	↓
Government Grants	$50,000	$0	5%	great	↑
Operating revenue	$50,000	$10,000	20%	ok	=
Total	$235,000	$31,000	$50,000		=

Chair of Fundraising Committee

1. run monthly meetings
2. calculate monthly reporting, annual Revenue Efficiency report
3. ensure volunteers are updating database
4. coach elevator speeches and probing questions to volunteers and Board members

Foundations

1. Build an inventory of donation ideas based on one-time funds and ongoing.
2. Research potential foundations: Grant Connect at local library (Imagine Canada's database)
3. Establish contact
4. Write proposal
5. Follow up in 12 months with performance metrics on their donation and ask for renewal.

Corporations

1. Build an inventory of sponsorship opportunities (see page 5).
2. Identify 40 leads (BofD contacts, presentation to local groups).
3. Research (corporate philanthropy page on website) of best 20 prospects. This assumes 1 rejection for every 1 donation.
4. Telephone call to ask about their marketing needs.
5. Send letter. For larger amounts, invite to "discovery meeting" with ED
6. Follow up telephone call. Connect on LinkedIn.
7. Brainstorm ideas for regular contact and write in calendar
8. Follow up in 12 months with performance metrics on their donation. Ask for renewal.

Major Donors – Acquisition

1. Evaluate whether threshold of $500 is appropriate
2. Upgrade regular donors – Identify regular donors just under the threshold. Research donors and their giving cycle. Send letter.
3. New donors - identify local groups and offer ED presentation. Attend event with ED and obtain business cards of potential donors. Research and email follow-up.
4. Brainstorm ideas for regular contact (page 16) and write in calendar.

Major Donors – Retention

1. Build inventory of donation ideas based on one-time funds and ongoing.
2. Identify major donors
3. Research donors and their giving cycle
4. Build an inventory of ideas for regular contact (page 16) and write in calendar:

Post event follow-up

1. During event - volunteers to get business cards from participants (ensure no duplication)
2. 2 days later – email photos to participants. Save date for next year.
3. 2 weeks later – email what you have done so far with funds raised
4. 4 weeks later – Brainstorm ideas on what you want participants to do (sign up newsletter, invite to next event, donation, etc). Volunteers telephone their participants.

Sample Marketing Tools

✓ Website

Your most important tool is your website. It is the first thing that many donors see.
A well crafted website can also save you time. If you need to make a brochure or donor letter, cut and paste from your website - you won't need to write from scratch and your "look" will be consistent. For more ideas, see MAS Marketing Bootcamp.

Does your website answer the 3 donor questions:
- Why should I give to you vs any other charity in Canada? eg "Why we are unique" webpage.
- What is your track record? Eg "Our Impact" webpage
- What impact will my donation have? Eg different price points on Donate webpage.

Does your website have:
- clear and concise text (no clutter)?
- easy navigation?
- lots of subheads and bullets for easier scanning?

✓ Idea inventories (page 16)

✓ Prospecting database vs donor database (page 17)

✓ Monthly meetings - agenda, reports (page 18)

✓ Donor letter templates, surveys, elevator speeches (page 19-20)

✓ Donor presentation (see MAS Marketing Bootcamp)

✓ Brochure (see MAS Marketing Bootcamp)

✓ printed handouts summarizing the project (Case for Support)
✓ printed handouts summarizing program sponsorship ideas (at different price points)
✓ generic business cards

Be prepared. By looking professional, you make it easier for donors to donate to you.

Idea inventories

Ideas to retain donors

Keeping an existing donor is cheaper than finding a new donor. Be patient with major donors. Over the 3 year relationship, there could be only **one ask** for a donation. Have a plan for year round communication. Brainstorm ideas such as:

- send tax receipt and include copy of magazine article about us.
- hand written thank you note from Board member
- hand written thank you note from anonymous client
- send photo of room with donor name on it
- ask to volunteer
- offer via email to do a LunchNLearn with their employees on our cause
- email and ask if there are other groups the donor could introduce for LunchNLearns
- send photo of event. Include handwritten sign with donor's name.
- send donor survey (see page 20 for donor satisfaction survey)
- Send quiz eg "Test your knowledge of our cause"
- Board member telephones and invites to a donor BBQ
- ED sends Xmas card, thanksgiving card, card on anniversary of donation
- 100 word story of a recent client
- photos of volunteers in action
- offer a tour of site
- email infographic that shows our impact on recipients, what we accomplished last year.
- ED message – how latest news affects our cause
- personal telephone call one month prior to renewal
- caution: do not rely on e-newsletters (lots of work to create; no personal touch).

How to match ideas to new donors

Think like a fundraiser. Listen to clues that prospective donors say and mentally sift through your inventories of donation ideas.

You meet a dentist at a party - Ask "how important is your donating to your customers?" With a donation of $x, you can receive a photo with your logo on a thank-you sign held by a recipient (or thank you note from anonymous recipient) that you can place in your newsletter to your dental customers."

Employee of large corporation – "Do you have an employee payroll/giving program?" Get business card and mail letter asking to be selected. Time letter close to re-selection window.

Employee of small corporation – "Do you have a matching program at work?" Get business card and send letter to forward to HR department so their "donation will go twice as far".

Employee of a manufacturer – Ask for staff to volunteer time.

The parents of a neighbour are downsizing – Ask for a gift in-kind.

Business social function – "What do charities do that you enjoy?" If the prospect likes public recognition, suggest naming a room (or scholarship) in honour of a family member.

Milestone birthday – "Do you really need more presents? Ask your family to donate in your name through CanadaHelps and you will get an e-card."

Sample Marketing Tools

Prospecting database vs donor database

Your Donor Database needs strong controls for privacy. Your Prospecting Database needs to be easy for volunteers to update - start with a Google spreadsheet that all volunteers can access.

Volunteer Contact: Abby				
Jane Doe, 123 Main St, 647-555-1212, jane.doe@gmail.com	April 1 accountant, sister ofJohn	May 2 Sent letter	June 3 Offered site visit.	July 4 Site tour. holiday soon.
James Bond 416-111-2222	June 9 Research			
Volunteer Contact: Betty				
Jack Ryder 706-333-3333	Feb 8Research	decline		

Why a Prospecting Database? Avoid the "plate of spaghetti"

Each volunteer can take ownership of several potential donors and spread the introductions over many months. Soon, the overlapping activities create a mess for the Chair to keep track of. Keep it up-to-date in case of staff or volunteer turnover and to avoid awkward repetitive requests. Find a way that volunteers are prompted when a donor is due for a touch point.

May	June	July	August
Corp Acquisition: Volunteer 1: Research 4 corporations Call and write 4 letters Volunteer 2: Invite to meeting Volunteer 3: Meetings Volunteer 4: Follow up Volunteer 5: Email mid-year results	**Corp Acquisition:** Volunteer 5: Research 4 corporations Call and write 4 letters Volunteer 1: Invite to meeting (May) Volunteer 2: Meetings (April) Volunteer 3: Follow up (March) Volunteer 4: Email mid-year results	**Corp Acquisition:** Volunteer 4: Research 4 corporations Call and write 4 letters Volunteer 5: Invite to meeting (June) Volunteer 1: Meetings (May) Volunteer 2: Follow up (April) Volunteer 3: Email mid-year results	**Corp Acquisition:** Volunteer 3: Research 4 corps Call and write 4 letters Volunteer 4: Invite to meeting Volunteer 5: Meetings (June) Volunteer 1: Follow up (May) Volunteer 2: Email mid-year results
Major Donor retention: Volunteer 6: Handwritten thank you to John Doe	**Major Donor retention:** Volunteer 6: Pre-renewal telephone call to Jane Dow	**Major Donor retention**: Volunteer 6: Invite Jeremy Harris to event	**Major Donor retention**: Volunteer 6: Follow up event Jeremy Harris

Monthly meetings

Sample agenda for monthly fundraising meetings:

1. YTD funds raised vs target
2. Monthly Activity Report (see below)
3. Lessons learned last month
4. Comments from each volunteer (is everyone keeping database updated?)
5. New ideas
6. Expectations for next month

Activity Report: month of June 201x			
Action	Foundations	Corp	Major Donors
# prospects researched	2	4	1
# new contacts	1	1	1
# client meetings	3	1	2
# follow up calls	5	6	3
Volunteer hours	10hrs	15hrs	10hrs
Lessons learned this month: Only book one tour/day, in case of bad weather.			

Sum for next year's Revenue Efficiency Report

Time is your most valuable resource. Make sure all volunteers and staff use their time wisely After 12 months, you will have enough data to calculate your acceptance ratio (#acceptances vs # declines) for the following year.

Donor letter template

Copy and paste from your website to ensure consistent messaging.
Each point should be addressed already in your Donate webpage.

Sample letter to corporations

Dear Jane Doe:

As a follow-up to my telephone message last week, I would like to offer suggestions on how we can help your employees. We can:

- give a LunchNLearn presentation to your employees about….
- offer leaflets that you can distribute to all your employees

About us

We are a community-based charity located in…. Since 2001, we have .... Our mission is to ...

Explain who + what + where + when + why + how

We offer individual and group support to people living with

- Xxx
- Xxx

We offer educational workshops and …... Without us, our community members would not learn how to ….

What happens if you didn't exist

We are efficient.

We have so many volunteers, if we had to pay them, our expenses would increase by 11%. See the difference your donation will make:

- $1,000 will give …
- $5,000 will …. If you wish, this project can be relabeled in your corporate name.

Key words that appeal to selected donor segment (eg small, local, high impact, see the difference)

Donation impact by price point

Here is a link to our website that shows the impact we have in our community. I will contact you next week to explore how we can work together.

Sense of urgency, eg reduce long wait times

Yours truly,

p.s. Your donation will be matched by a generous donation from ABC Co.

Attach an emotional story

Attach an infographic of your results from last year

Attach a summary of why you are unique

Sample Marketing Tools

Elevator speeches

Role play with your Chairperson

Q: What is your charity? (summarize who+what+where+when+why+how)
Q: Why should donors care about your cause?
Q: Amount of good your charity is doing? ("Last year, we...")
Q: How will you use a donation? (memorize various price points)
Q: Why are you personally connected to this cause? (your personal story – say how volunteering makes you feel)
Q: Tell me about your volunteering? (be prepared to give a 10-second summary of all of the points above)

Memorize probing questions to ask donors

Here are sample questions you can ask to start a conversation with a potential donor. As you are listening to the answers, mentally sift through your "idea inventories" to select an idea that the potential donor may find interesting.
Q: What causes are you passionate about? What organizations do you support?
Q: Why is donating important to you?
Q: What do other charities do that you enjoy?
Q: Do you have any personal experience with our cause?
Q: Do you remember the first time you ever gave back? How did you feel?

Donor satisfaction survey

(either paper or SurveyMonkey)

Thank you so much for donating to us. We are seeking feedback from donors so that we can improve your experience. Would you please take a few moments to answer our questions?

1. After your donation, were you thanked appropriately? Yes/no/other
2. Did we share the impact of your gift? Yes/no/other
3. Are you satisfied with the communication we send? Yes/too much/not enough
4. Is there anything we should do differently?
5. What inspired you to give us your gift?
6. Would you recommend us to family or friends? Yes/no
7. Yes/no - I have already arranged for a gift in my will
   Yes/no - I would like more information on how to make a bequest in my will.

Space for donor name (optional)

Other MAS publications

- Marketing Bootcamp – for EDs of small nonprofits
- Midsize Nonprofits: Marketing Self Audit
- Part 1 – How nonprofits can recruit and manage Skilled Volunteers
- Part 2 – Orientation for Skilled Volunteers
- Common Governance Problems
- Common HR problems

About MAS Consulting

Management Advisory Services is a pro bono consulting service, operating in Toronto since 1993. Completing 200+ projects per year, we help small and midsize non profits in governance, strategy, HR, marketing, fundraising, finance, IT, executive coaching and facilitation. As a volunteer-run charity, MAS is funded by donations from volunteers and satisfied nonprofit clients.

Our 50+ Volunteer Consultants are professionals who give back using the skills we learned in our careers.

Our mission is to build capacity in the non profit sector.

Lelia MacDonald, B.Comm, MBA
MAS Volunteer Consultant, Marketing Practice Leader

If your nonprofit needs consulting help, contact MAS
www.masadvise.org
info@masadvise.org
416-963-5792

MAS

Pro Bono Consulting for Non-Profits